HIGHER EDUCATION PROGRAMS INSTITUTIONAL SERVICE SYSTEM

GRANT ELIGIBILITY APPLICATION USER GUIDE

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GEA QUICK SHEET

This page provides a quick overview of the HEPIS Grant Eligibility Application system and how to use it. We recommend you review the entire User Guide to learn more about how each part of the system works so you can fully understand the Title III/Title V grant eligibility application process.

1. **Log in to https://hepis.ed.gov with your username and password**

   See **Sections II & III** of this user guide for more details about logging into the system

2. **Check to see if your institution has been determined eligible for a Title III or Title V grant based on 2018 data extracted from NCES and if so, print your *eligibility letter***

   See **Section V** and **Section VIII** of this user guide for more about checking your eligibility status and printing your eligibility letter

3. **If your institution is not determined to be eligible based on NCES data, you may choose to provide additional information by completing an *Eligibility Application***

   See **Section IX** of this user guide for more information about the Application

4. **If your institution is not determined to be eligible based on your Application, you may choose to submit an *Exemption Request*, which will be reviewed by Department staff and will be granted or denied based on their determination**

   See **Section X** of this user guide for more information about Exemption Requests

For complete details about this entire process, please read this **User Guide** and the **Application, Instructions and blank ED Form 1049**, both of which are available at https://hepis.ed.gov/help.

I.   About the Grant Eligibility Application System

The Grant Eligibility Application (GEA) system is used to determine if an institution is eligible to apply for a new Title III or Title V grant in the next fiscal year.

Institutions are eligible to apply for grants if they meet specific statutory and regulatory eligibility requirements. An institution of higher education (IHE) that is designated as an eligible institution may also receive a waiver of certain non-Federal cost-sharing requirements for one year. If an institution is eligible, they may download their eligibility letter from the system.

An institution is determined to be eligible one of three ways: via Pre-eligibility based on NCES data, Application, or Exemption Request.

Pre-eligibility. The GEA system is populated with a data extract from the National Center of Education Statistics (NCES). An institution is determined to be *pre-eligible* if their Pell Grant recipients are EQUAL TO OR ABOVE the current year's threshold and their Core Expenses are EQUAL TO OR BELOW the current year's threshold. Due to reporting timeline constraints the most recent data extract is always two years old, so if an institution is not deemed eligible via the data extract, there are alternatives.

Application. If an institution does not meet the pre-eligibility requirements, they may choose to complete an application. The *Application* provides an institution with the opportunity to provide additional and/or updated information that may cause their numbers to meet threshold requirements, and therefore be determined eligible.
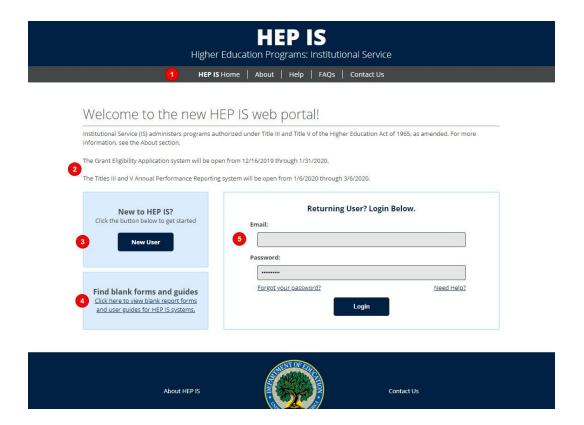
Exemption Request. If an institution's application does not meet the eligibility requirements, they may choose to submit an exemption request. The *Exemption Request* provides an institution with the opportunity to provide further details and/or information that may explain why they do not meet threshold requirements, and justify why they should be granted eligibility despite the numbers they submitted. Exemption requests are reviewed by Department staff and will be granted or denied based on their determination.

The GEA system generally opens in the late fall or early winter and remains open for approximately 60 days.

For more information please see: https://www2.ed.gov/about/offices/list/ope/idues/eligibility.html

II.   HEPIS Home Page

After accepting a standard disclaimer regarding usage of a Federal website, you will be able to access the HEPIS system home page.

1. **Main Menu Links**:
    a. **HEPIS Home** - return to the home page
    b. **About** - learn more about the HEPIS website and each of its subsystems.
    c. **Help** - access User Guides, blank forms, and other helpful resources
    d. **FAQs** - review answers to frequently asked questions
    e. **Contact Us** - fill out a contact form to request assistance from the Help Desk (staffed Mon-Fri, 9 am-5 pm Eastern time; telephone support is not available)

2. **System Information** - look here for important information about when various HEPIS subsystems are opening and closing.

3. **New User** - click here if you need to request a new user account

4. **Blank forms and guides** - another link the the *Help* page described above

5. **Login fields**:

a. **Email** - in this system your username is your email address
b. **Password** - remember not to share your password with anyone; additional users require their own accounts linked to their own email addresses
c. **Forgot your password** - to request a link via email to reset your password
d. **Need help** - another link to the *Contact Us* page described above
e. **Login** - after entering your username and password, click this button to login

A. New User Accounts

If you need a new user account, click the **New User** button and enter your email address into the field provided. The system will check to see if your email is already registered.

If your email address is not in the system, you'll be presented with a form to request a new user account. Make sure you provide the new user's:

- First Name
- Last Name
- Email Address,
- Institution Name, and
- Institution OPEID

The Help Desk must verify that the new user is authorized to access the application by contacting an individual that is currently in the system from a previous year.

Please allow up to one business day for new accounts to be created.

To save a step and expedite this process, you may choose to have someone who completed the Eligibility Application in a previous year fill out the new account request form rather than the new user.

III. Two-Factor Authentication

All Federal websites are now required to include **TWO-FACTOR AUTHENTICATION** in the login process. You may have seen this on other websites, especially those for banks and credit card companies.

Two-factor authentication requires that you login first with something you *know* (i.e., your username and password), and then with something you *have* (e.g., your phone).

You'll have the option to authenticate to the HEPIS website by means of:
- a smartphone app,
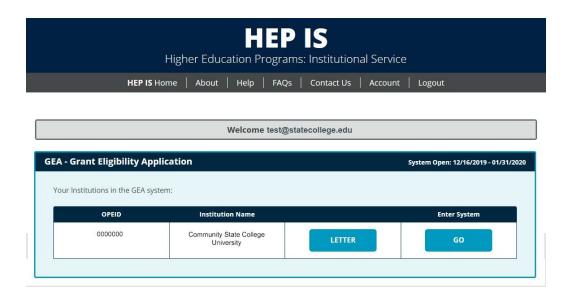- a text message, or
- a voice telephone call.

You'll authenticate by confirming a request in the app, or by entering a 6-digit code onto the website sent to you by text or by voice.

The smartphone app is the recommended option, but we realize not everyone will have the access or the desire to use an app.

No matter which method you choose, the website will walk you through the setup process step by step. Setting it up will take less than five minutes, and using it each time you login will take only a few seconds.

IV. HEPIS Landing Page

After you successfully log into the system, you will be on the HEPIS Landing Page.

Your landing page may look different from the one displayed above. It will show you the Institution and Grants (if applicable) that your account has the rights to access.

The main menu has two additional links now that you're logged in:
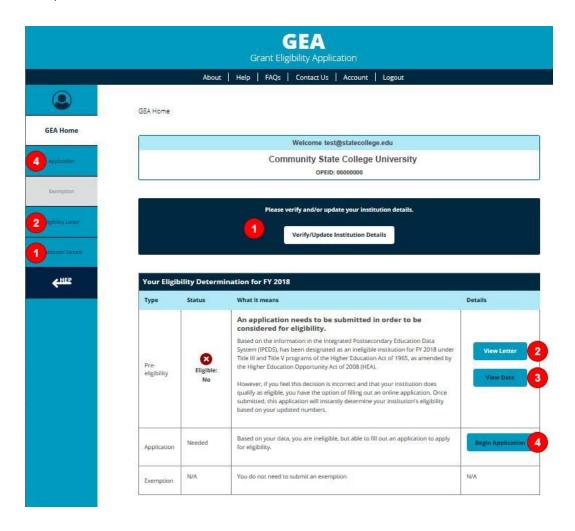1. **Account** - click here to change your password and manage your two-factor authentication method(s)
2. **Logout** - click here to end your user session and logout of the system

To download your eligibility letter, click the **LETTER** button. If that button is inactive or greyed out, it means your institution is currently not deemed to be eligible. If the system is still open, you should enter the system and submit an Application and/or an Exemption Request, as needed.

To enter the Grant Eligibility Application system, click the **GO** button.

V.   GEA Home Page

The GEA home page will show you your eligibility at a glance. As you can see below, there is a red "X" in the Status column of the Pre-eligibility row. This means that our test institution is not eligible based on their data imported from NCES.
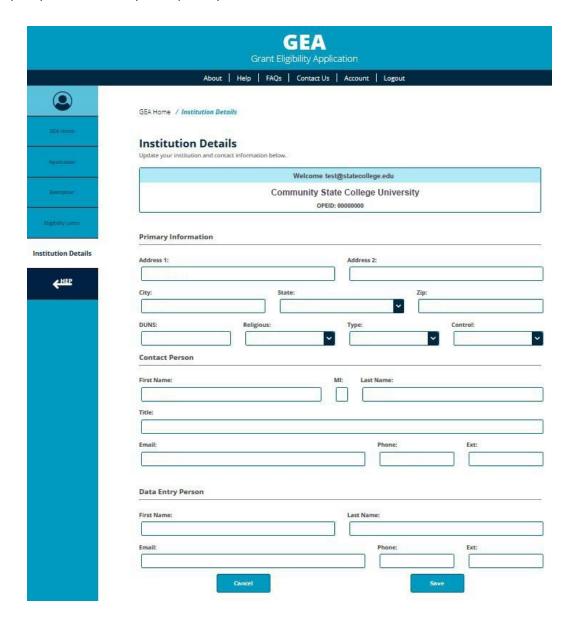

From the GEA home page you can perform the following tasks:

1. **Verify/Update Institution Details** - every year the first thing you should do is review your Institution details and make any updates necessary (see Section VI)
2. **View Letter** - view and download your eligibility letter (see Section VIII)
3. **View Data** - view your eligibility data as determined from NCES (see Section VII)
4. **Begin Application** - if not determined to be pre-eligible, begin your eligibility application (see Section IX)

Note: the **Begin Exemption Request** button in the last row of the table will be available only if and when a user needs it (see Section X, if applicable).

VI.   Institution Details

Each year you should verify and update your Institution details.
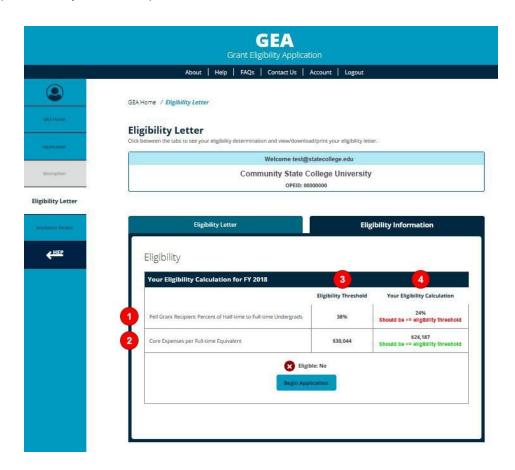

The sample above is blank, but your Institution's details will be pre-populated for you. Please verify that all information is correct, including the names and contact information for the primary Contact Person (required) and an Additional Data Entry Person (optional).

Click **Save** when done making updates.

VII.   NCES Eligibility Data

Click the **View Data** button on the GEA Home Page, or click the Eligibility Letter option on the left menu then the Eligibility Information tab to see the data that was extracted from NCES to determine your eligibility status.

REMEMBER: DUE TO REPORTING TIMELINES THE DATA EXTRACTED FROM NCES IS TWO YEARS OLD. Therefore your eligibility for FY 2020, for example, is determined based on your Institution's data from FY 2018 (i.e., school year 2017-18).

There are two important points of data on this screen:
1. Pell Grant recipient percentage, and
2. Core Expenses per FTE.

Each of these values has a *Threshold* (3) that must be met in order for your Institution to be determined eligible. The threshold varies from year to year, and on school type (2yr/4yr) and control (public/private).

Your Eligibility Calculation (4) shows your Institution's data for the FY noted in the table header (current fiscal year minus two years, again, due to NCES reporting timelines). As seen above, Pell Grant percentage should be **greater** than or equal to the threshold, and Core Expenses should be **less** than or equal to the threshold. This text will display in **green** if your Institution passes the test, or in **red** if it doesn't.

If your institution passes *both* of these tests, then it is determined to be **eligible** based on NCES data. This means you're done! You may now download your Eligibility Letter (see Section VIII).
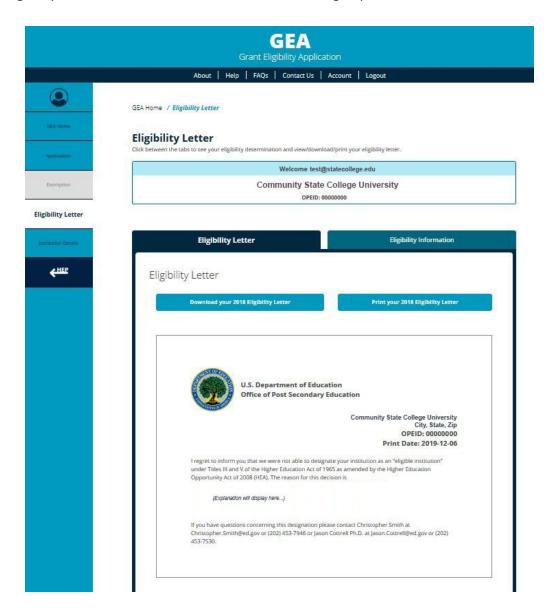
If your institution fails *either one* or *both* of these tests, it is determined to be **ineligible** based on NCES data. You now have the option of filling out an Application where you can provide additional data that may change your eligibility status.

Click the **Begin Application** button to proceed (see Section IX).

VIII.   Eligibility Letter

Click the **View Letter** button on the GEA Home Page, or click the Eligibility Letter option on the left menu then the Eligibility Letter tab to view and download your eligibility letter.

Your eligibility letter will list the programs your Institution is eligible to apply for, and can also be used to show eligibility for a waiver of the non-Federal share matching requirements.
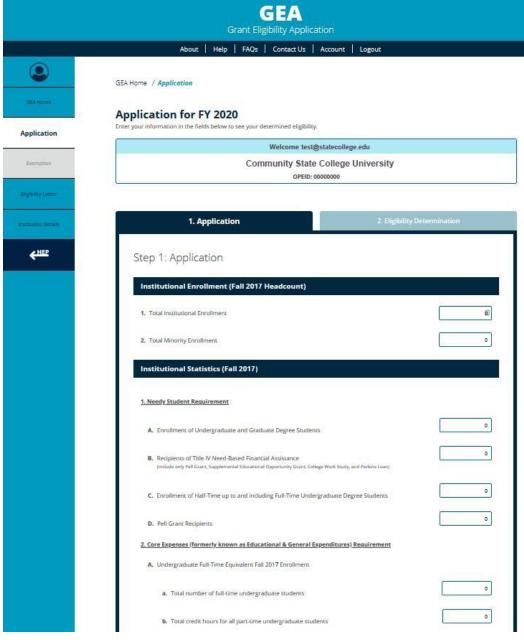

If you've submitted an Application and an Exemption Request and you're ultimately deemed ineligible, as our sample Institution is here, your letter will include the determination by Department staff in the space indicated in the image above.
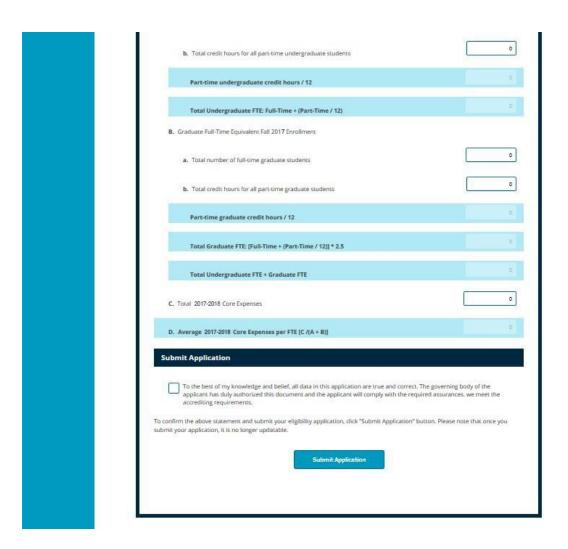
IX. Application

The Application provides an institution with the opportunity to provide additional and/or updated information that may cause their numbers to meet threshold requirements, and therefore be determined eligible.

All fields on the Application are required.

(continued on next page…)

To submit your application, complete all fields and check the box near the bottom confirming that all data in this application are true and correct to the best of your knowledge. Then click the **Submit Application** button.

If the data you supply changes your Pell Grant percentage or your Core Expenses and satisfies the threshold requirement, you will be informed immediately. This means you're done! You may now download your Eligibility Letter (see Section VIII).
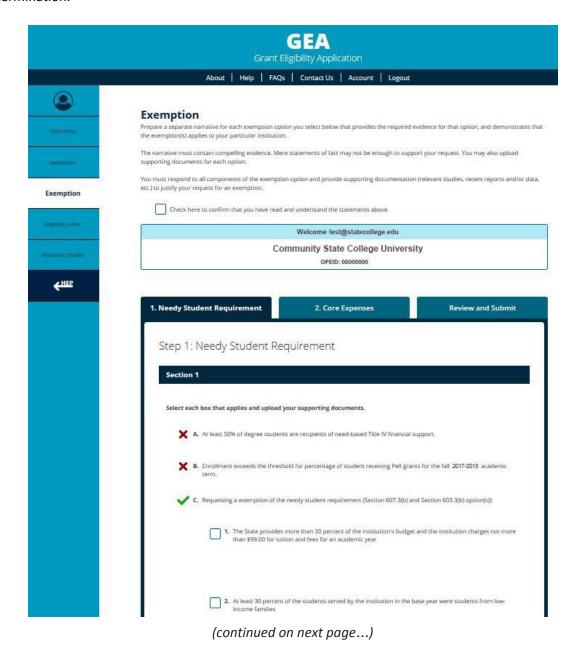
If not, you will have the option to fill out and submit an Exemption Request (see Section X).
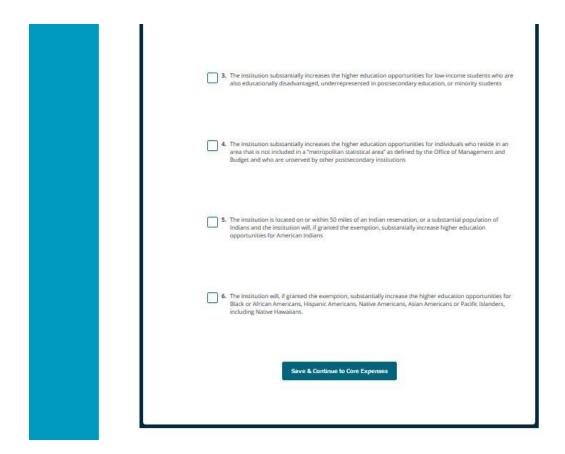
For more information about the Application and the data requested on it, please see the "Application, Instructions and blank ED Form 1049 in PDF format" link on the Help page.

X.   Exemption Request

The Exemption Request provides an institution with the opportunity to provide further details and/or information that may explain why they do not meet threshold requirements, and justify why they should be granted eligibility despite the numbers submitted.

Exemption requests are reviewed by Department staff and will be granted or denied based on their determination.

It's very important that you read the instructions at the top of this page. You will not be able to submit your form unless you've checked the box indicating that you've read and understand the instructions.
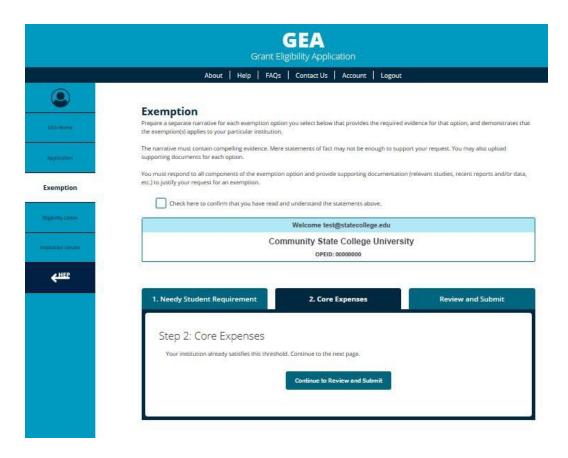
As you can see above, the sample Institution failed the Needy Student requirement both in their NCES data and in their Application. Now they are requesting an Exemption for this requirement, which is represented by the green check mark at the top of the form.

There are six options which an Institution could choose as the basis for their Needy Student exemption request. To read them in full, please refer to the **Application, Instructions and blank ED Form 1049** found on the Help page.

You must select at least one option, but you may select more than one if appropriate. Click the check box next to the option or options you wish to respond to.
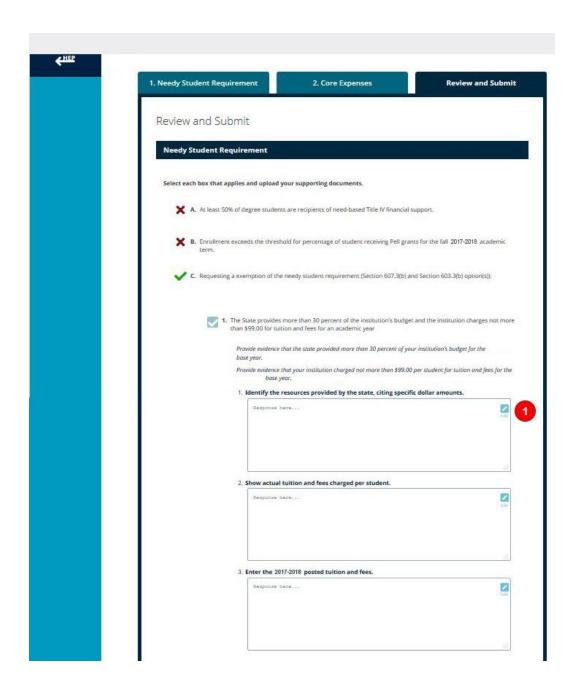
Whichever option(s) you select, you must answer each question that will appear when you click the appropriate check box. As noted in the instructions at the top of the form, you must also provide supporting documentation (relevant studies, recent reports, and/or data, etc.) to justify your exemption request.

Our sample Institution satisfied the Core Expenses requirement, therefore does not need to submit an exemption request for this category.

Based on your scenario, you may be asked to provide an exemption request for one, the other, or both categories. If you do not have to submit a request, the system will not prompt you for the information.

On the Review and Submit page you will have the opportunity to review and edit your responses, if necessary, as seen in the following excerpt from the page. Just click the **Edit** button (1) in the appropriate field if you need to edit your response (see below).

Submit your Exemption Request when you are satisfied with your responses.

Your eligibility letter will be ready for download after Department staff has had a chance to review and evaluate your request. Your letter will include a synopsis of their evaluation.